



THE SPORTS FAN MINDSET

2014

**SPORTS &
LEISURE**
RESEARCH GROUP



February 2014

Two Minute Take-Aways

- NFL, NCAA Football and MLB remain most popular, while the NHL regains lost ground to reach statistical parity with the NBA.
- Strong popularity surges are evident for European Soccer, NCAA Men's and women's basketball. Boxing, horse racing and WNBA struggle
- Walking, fitness, running and cycling show greatest strength as recreational sports.
- Commissioner Stern goes out on a high, while Goodell and Bettman see rebound in fan approval.
- Fan tolerance for the proliferation of NCAA Bowl games improves, but fans reject college athlete pay for play; bristle at conference musical chairs.
- MLB fans welcome instant replay; Lament player movement; See a new Champion in 2014

Two Minute Take-Aways (continued)

- NBA fans grow more concerned about lack of competitive balance as nearly four in ten expect a “Re-Heat” in 2014. Fans skeptical about potential strong return for Derek Rose.
- NFL fans remain concerned with concussions but are still willing to “take the risk.” They show strong aversion to a European based NFL team but extoll the league’s competitive balance.
- Fans show little tolerance for polarizing players; do not bemoan the speed of the coaching axe.
- Some signs of cautious optimism and a more positive future, intertwine with lingering job security concerns.
- Fans learning to deal with information overload as the hesitancy to indulge shows some abatement.
- Child-centricity and a focus on service as a differentiator remain at the forefront for sports fans, as more valued family time fuels an appetite for vacations

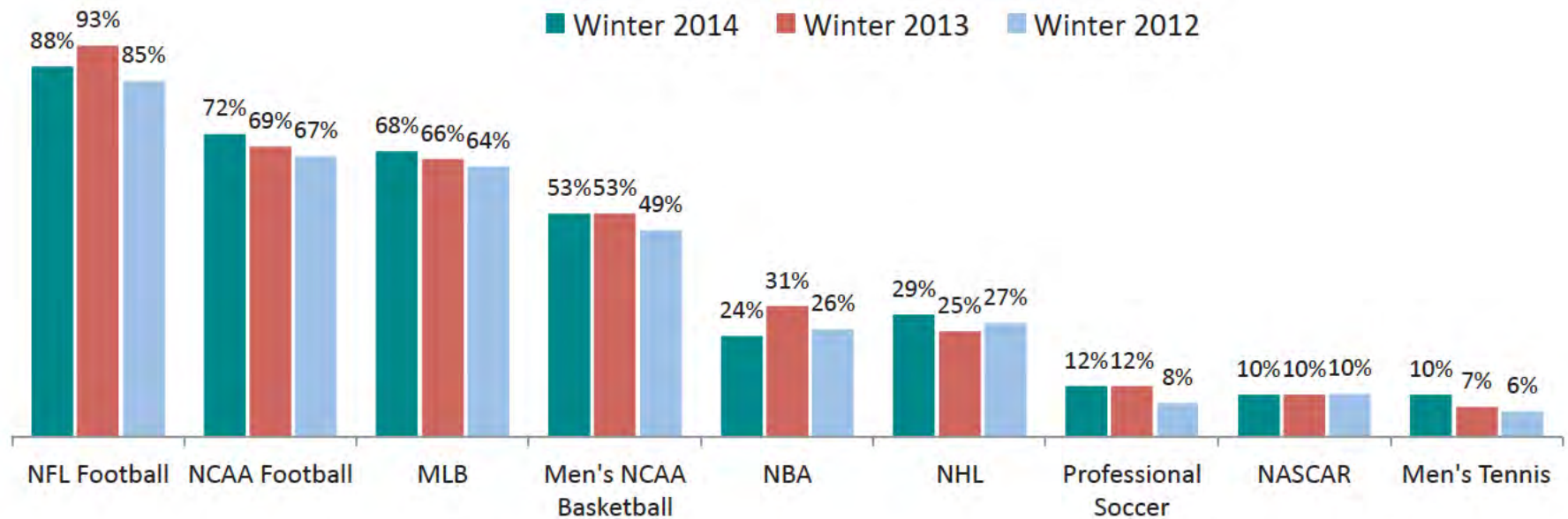
Background, Objectives and Methodology

- Winter 2014 SLRG Sports Omnibus
 - Assess the attitudes and perceptions of American sports fans
- Initiated by Sports and Leisure Research Group in 2009
- 2014 online survey of over 1,500 total respondents



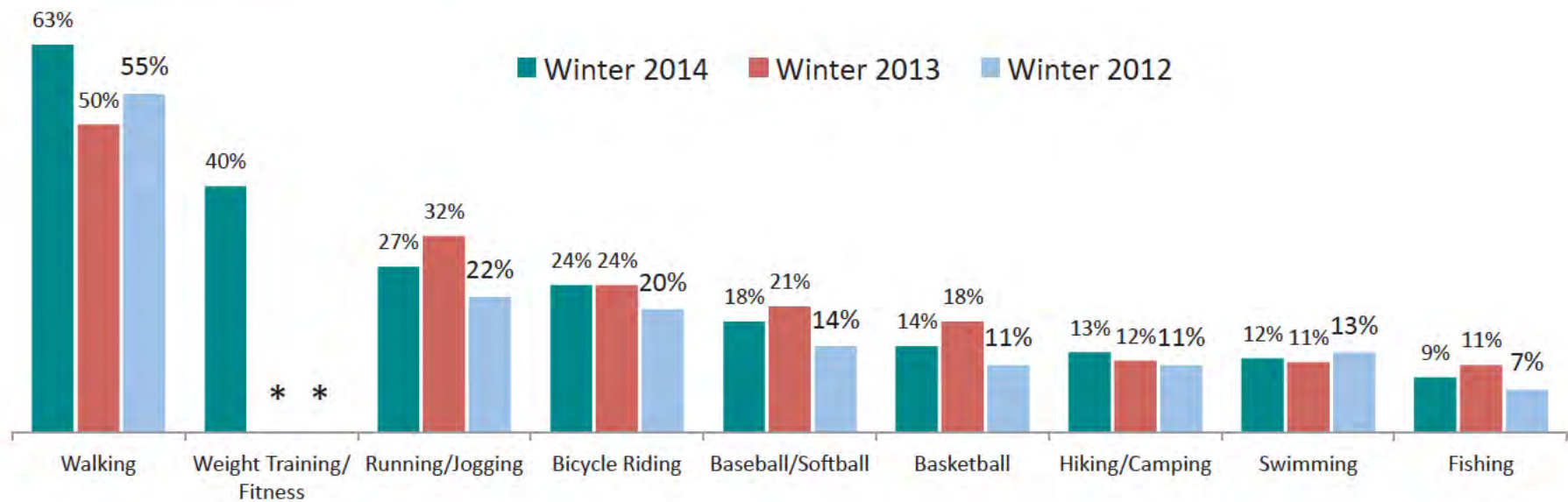
Top Four Most Popular Sports Remain Unchanged While NHL Now at Parity with NBA

Q I watch and follow _____ closely



Recreational Sports Participation: Walking; Fitness, Running Most Prevalent

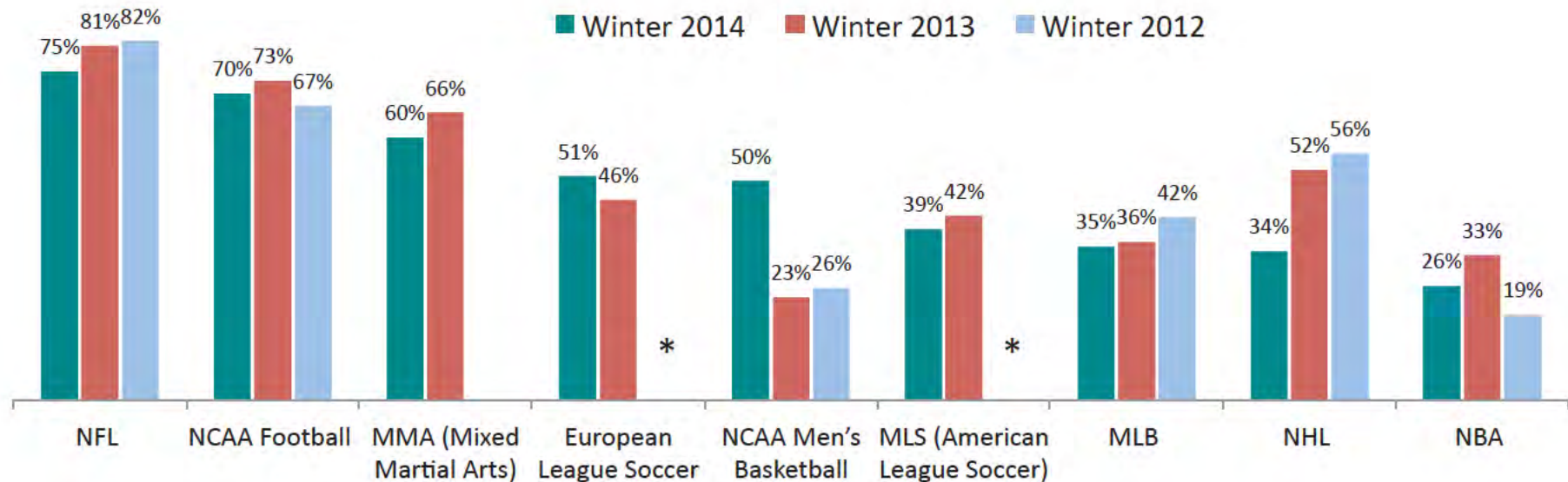
Q Which of the following sports do you participate in regularly, that is at least twice per month during season?



*Note: Fitness is new for 2014

Perceived Popularity of Professional Sports: NFL Remains Top of the Hill; European Soccer, NCAA Men's Hoop, Surge

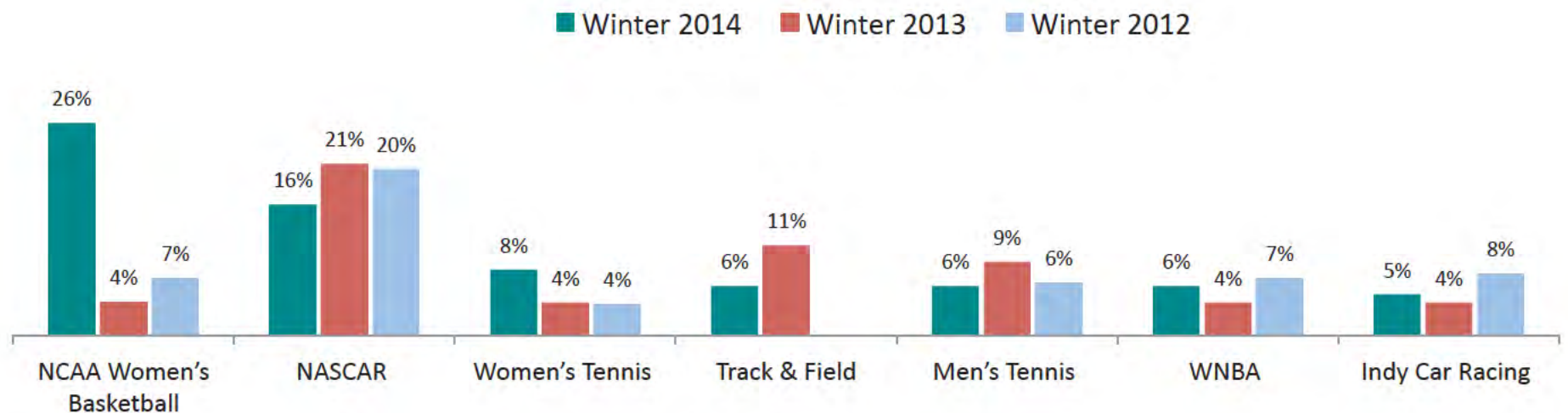
Q Please indicate whether you think this sport has become **MORE** popular



*Asked as just "Soccer" in 2012

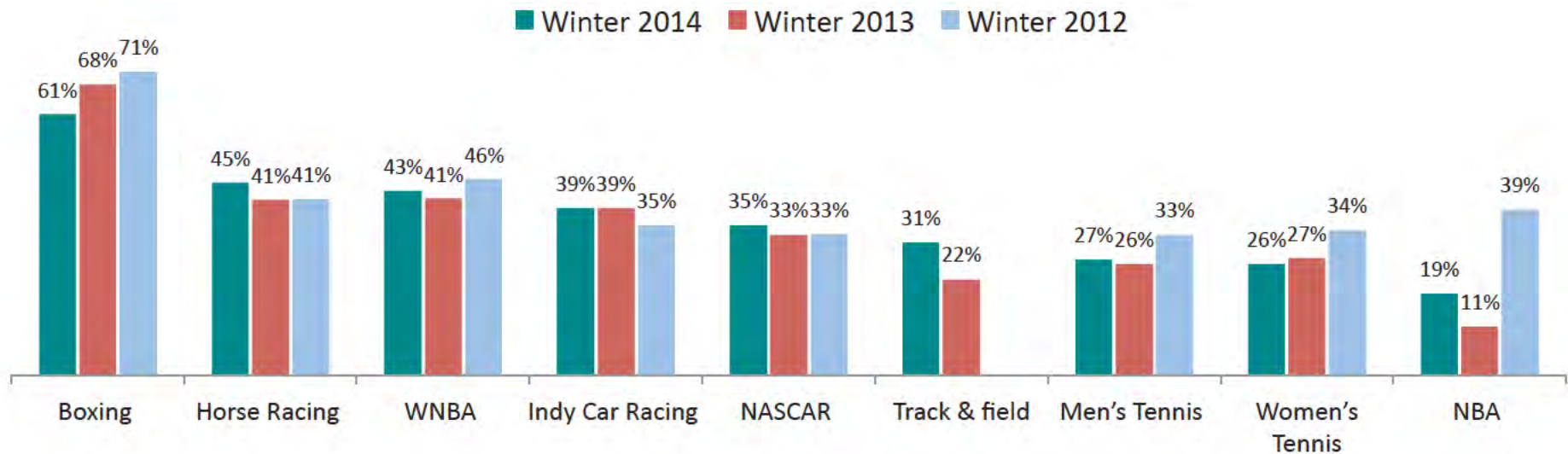
Perceived Popularity of Professional Sports: NFL Remains Top of the Hill; European Soccer, NCAA Men's Hoop, Surge

Q Please indicate whether you think this sport has become **MORE** popular (continued)



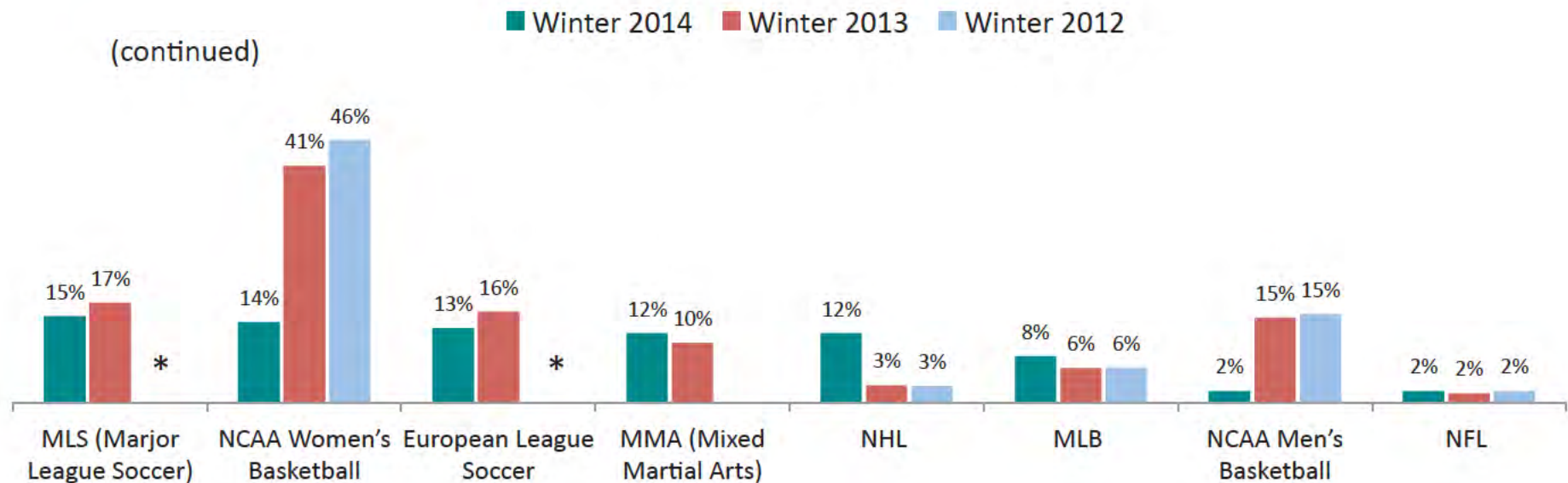
Horse Racing, Track and Field Struggle Year Over Year

Q Please indicate whether you think this sport has become **LESS** popular



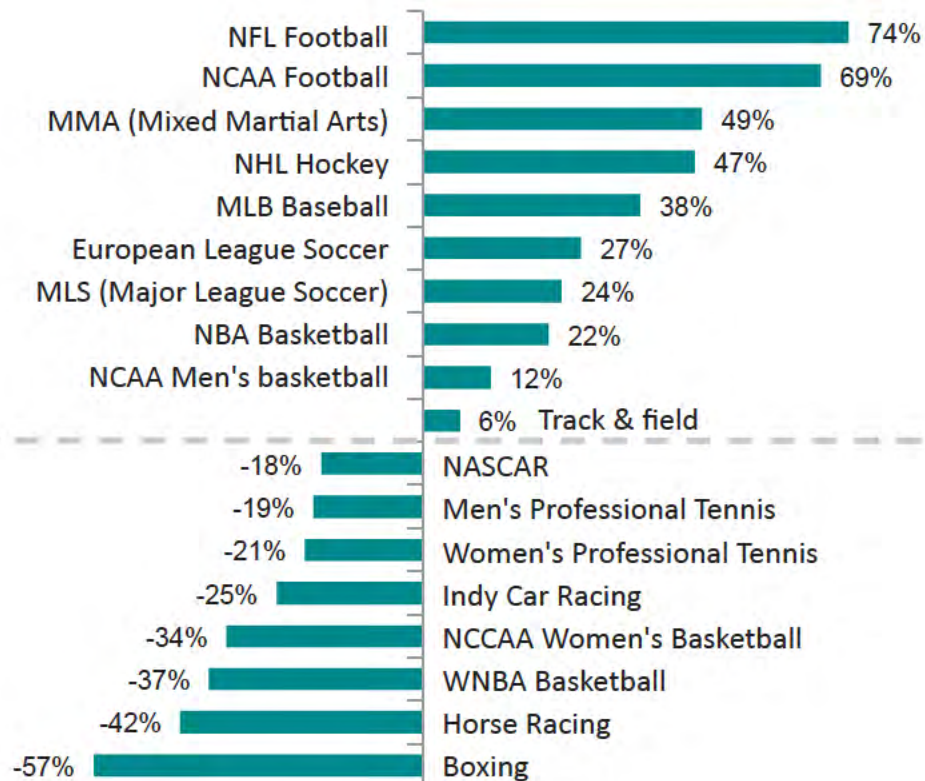
Horse Racing, Track and Field Struggle Year Over Year

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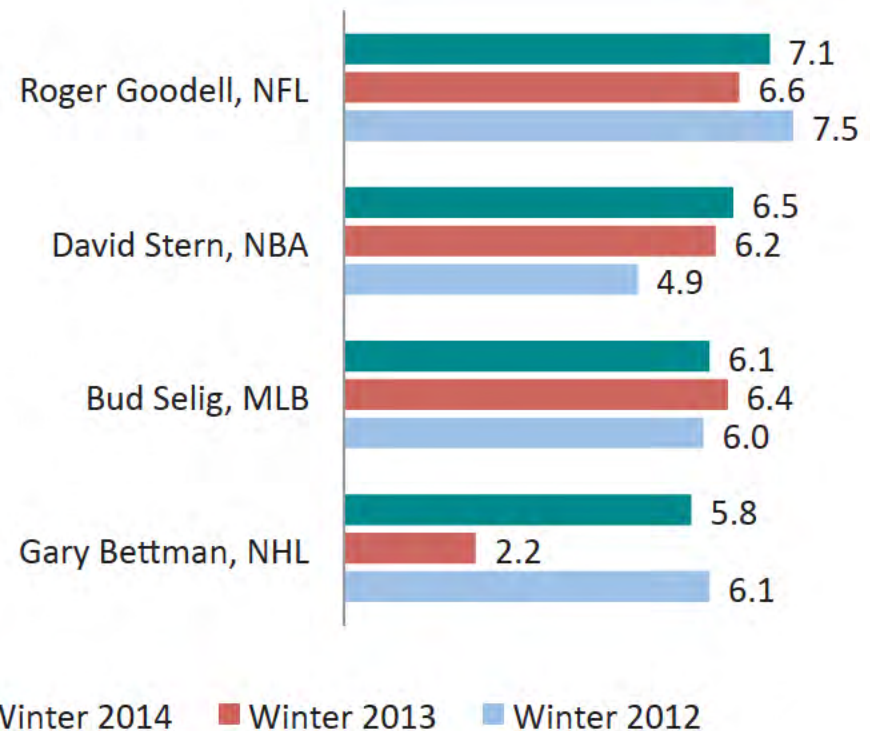


*Asked as just "Soccer" in 2012

Difference Between Those Who Say A Sport is Gaining vs. Losing Popularity: Football continues to dominate. Big comeback for the NHL



Approval Ratings on Commissioners: Stern Goes Out on a High; Goodell and Bettman Rebound



Topical Issues: NCAA Attitudes



TOP 3 BOX SUMMARY	2014 Sports Fans	2013 Sports Fans	2012 Sports Fans
There are too many college bowl games	57%	69%	76%
The Four team BCS Playoff will be a great solution towards determining the best team in NCAA College Football	41%	43%	
College athletes should receive cash compensation for their participation in Division I sports	27%		
Major college conference realignment has been a positive for me, as a fan	14%		

Topical Issues: MLB Fans Bullish on Instant Replay, Still Covet Less Player Movement

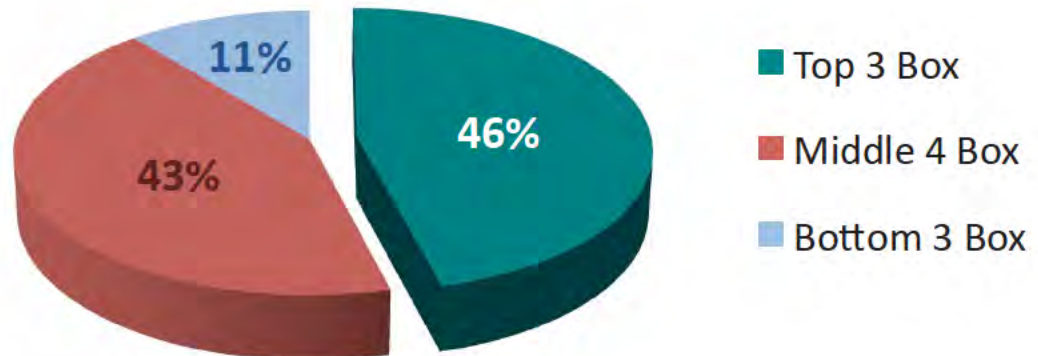


TOP 3 BOX SUMMARY	2014 Sports Fans	2013 Sports Fans	2012 Sports Fans
The expanded use of the instant replay will be good for Major League Baseball	63%		
I wish that MLB could find a way to keep star players on their original teams for more of their careers	57%	50%	55%
MLB has been appropriate in its investigation and handling of the most recent player suspensions related to PED use	38%		
The Boston Red Sox will win the 2014 World Series	8%		

Topical Issues: The Plurality of Hockey Fans Like the New Divisional Alignment



Level of Agreement: “The realignment of divisions in the NHL has been good for the game”

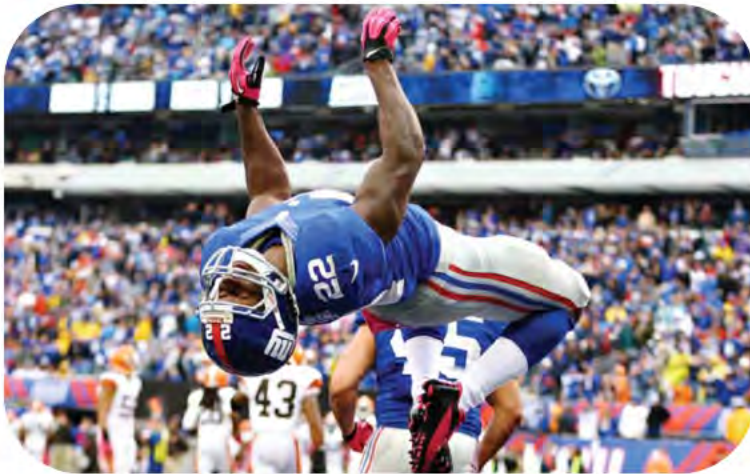


Topical Issues: Competitive Balance Becomes a Greater Concern, as Nearly 40% of Fans Expect a "ReHeat" in 13-14



TOP 3 BOX SUMMARY	2014 Sports Fans	2013 Sports Fans	2012 Sports Fans
There aren't enough teams capable of winning a Championship in the NBA	48%	37%	44%
The Miami Heat will repeat as NBA Champions	38%	33%	32%
Derek Rose will return from his injuries and again play at an elite level in the NBA	17%		

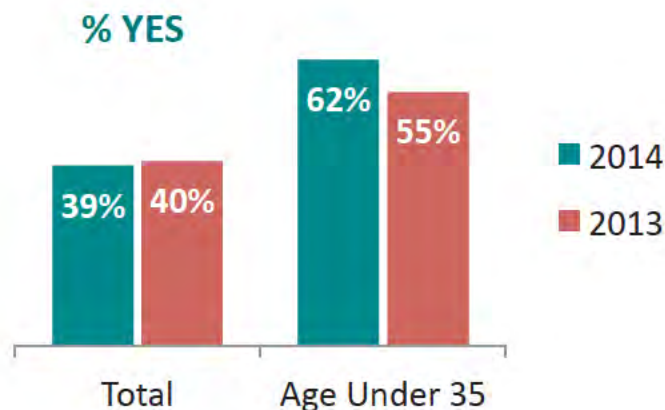
Topical Issues: Competitive Balance is Fine Though a Europe Based Team is Not



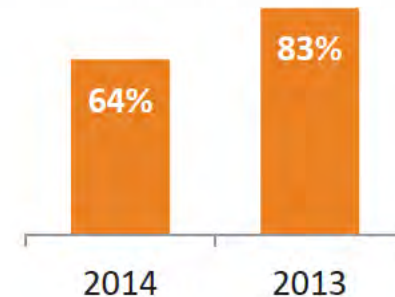
TOP 3 BOX SUMMARY	2014 Sports Fans
What happens in an NFL locker room and on the practice field should stay there	48%
There's too much parity in the NFL	7%
I'd be excited to see an NFL team based in Europe	4%

The Concussions Contradiction: Meaningful Shift in Concerns as Younger NFL Fans are More Willing to Trade Risk for Reward

Q Assume for a moment, that a genie offers you the following proposition: You will be given the opportunity to live or re-live your life with the ability to become an All-Pro NFL player, recognized as one of the best at your position in the league and compensated accordingly. You will enjoy a lucrative 10 year career that enables you to retire from the game with both celebrity and lifetime financial security. However, at age 65, you will begin to show the onset of dementia. **Do you accept the genie's offer?**

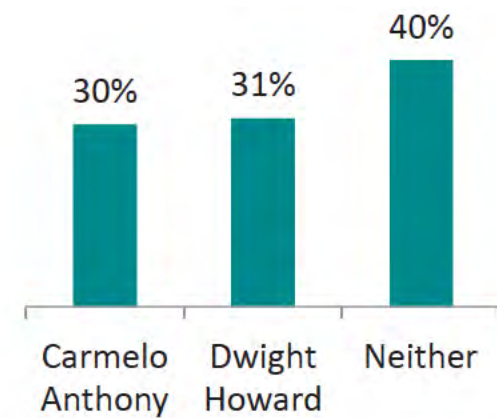
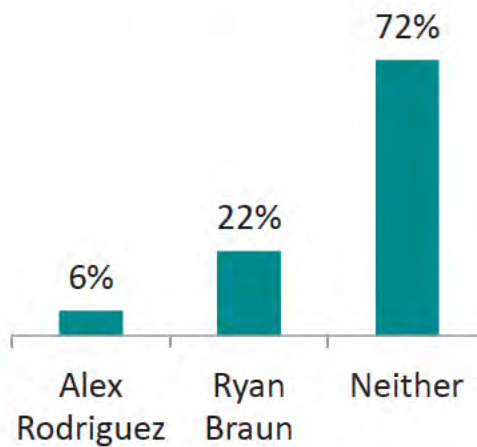
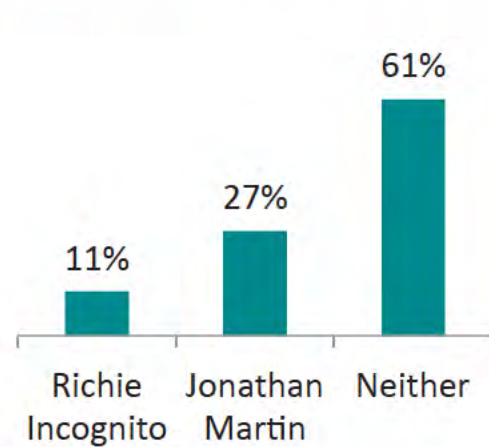


"The issue of concussions in football is among the most serious problems that must be dealt with"



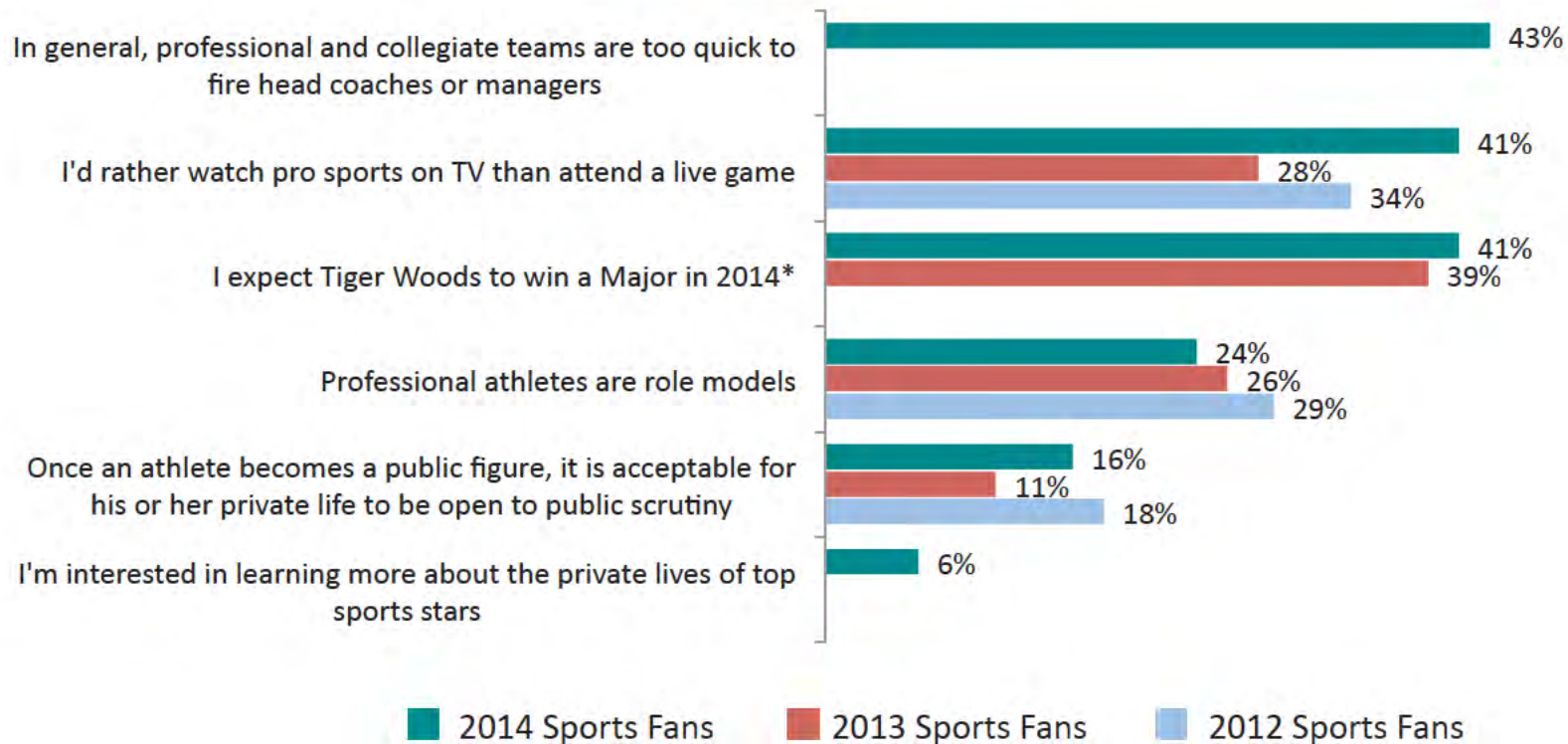
The "Bad Dream Team": Fans Show Waning Interest In Polarizing Players

Q Who would you rather have on your team?

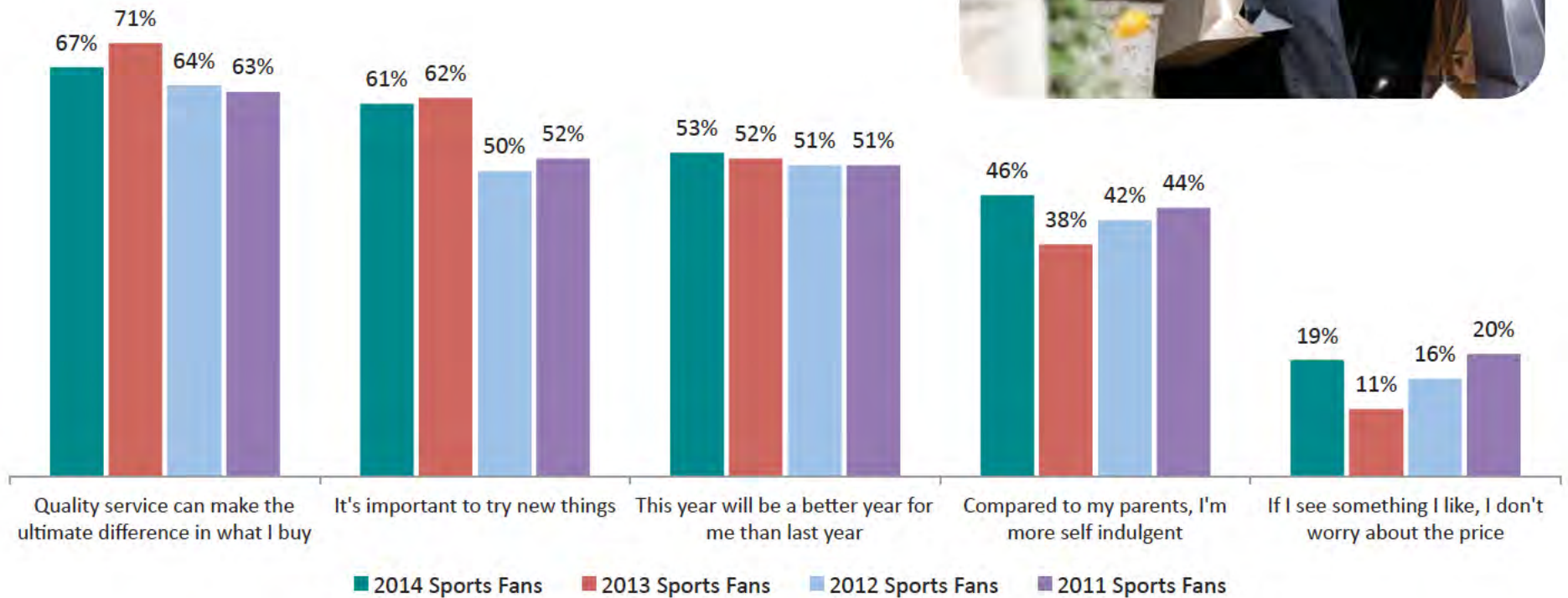


Other Fan Attitudes: The In Venue Sports Experience Feeling Greater Heat from TV, "Win or Perish" For Coaches, Not Rejected by Fans

Top 3 Box Summary

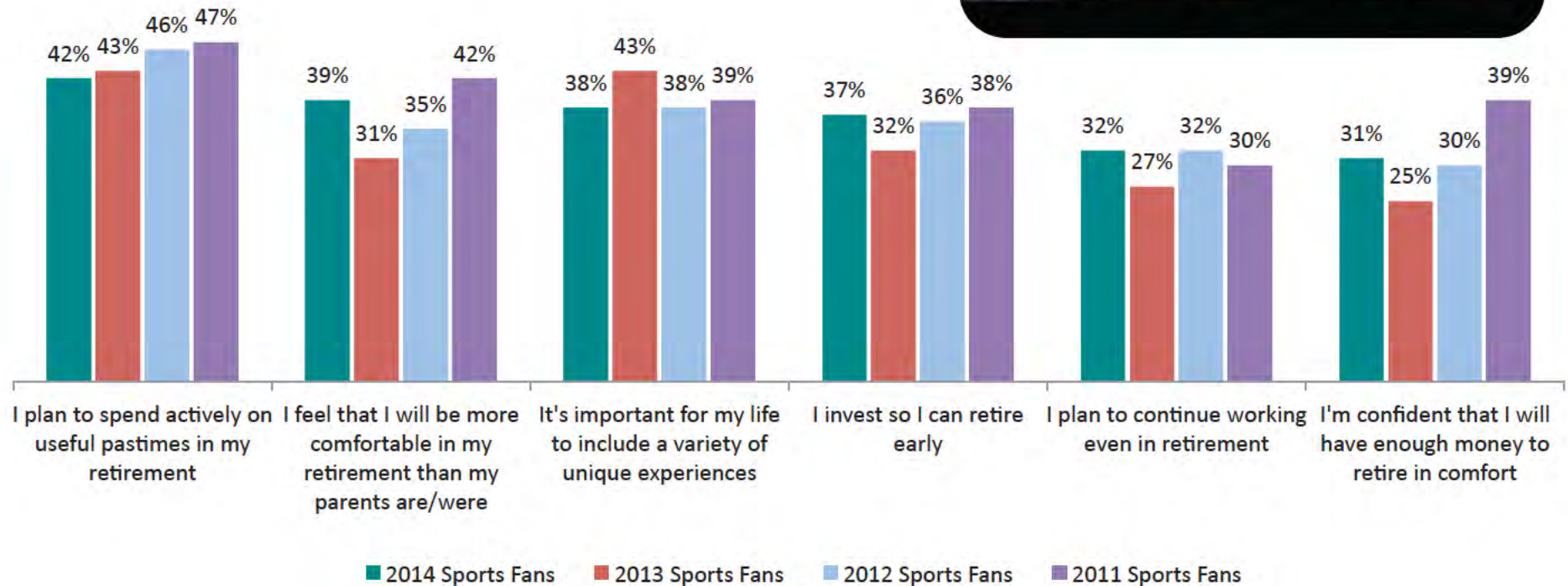


Sports Fan Attitudes: Return to Indulgence?



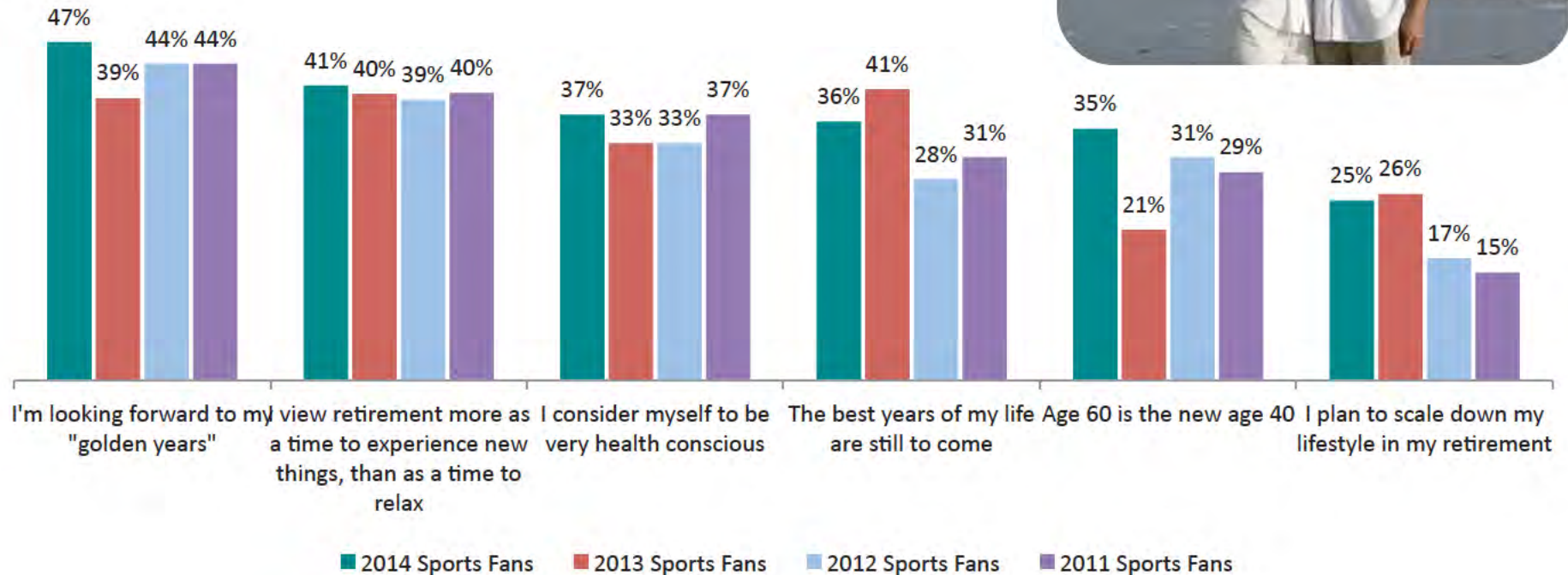
Top 3 Box Summary

Sports Fan Attitudes: Careful Optimism



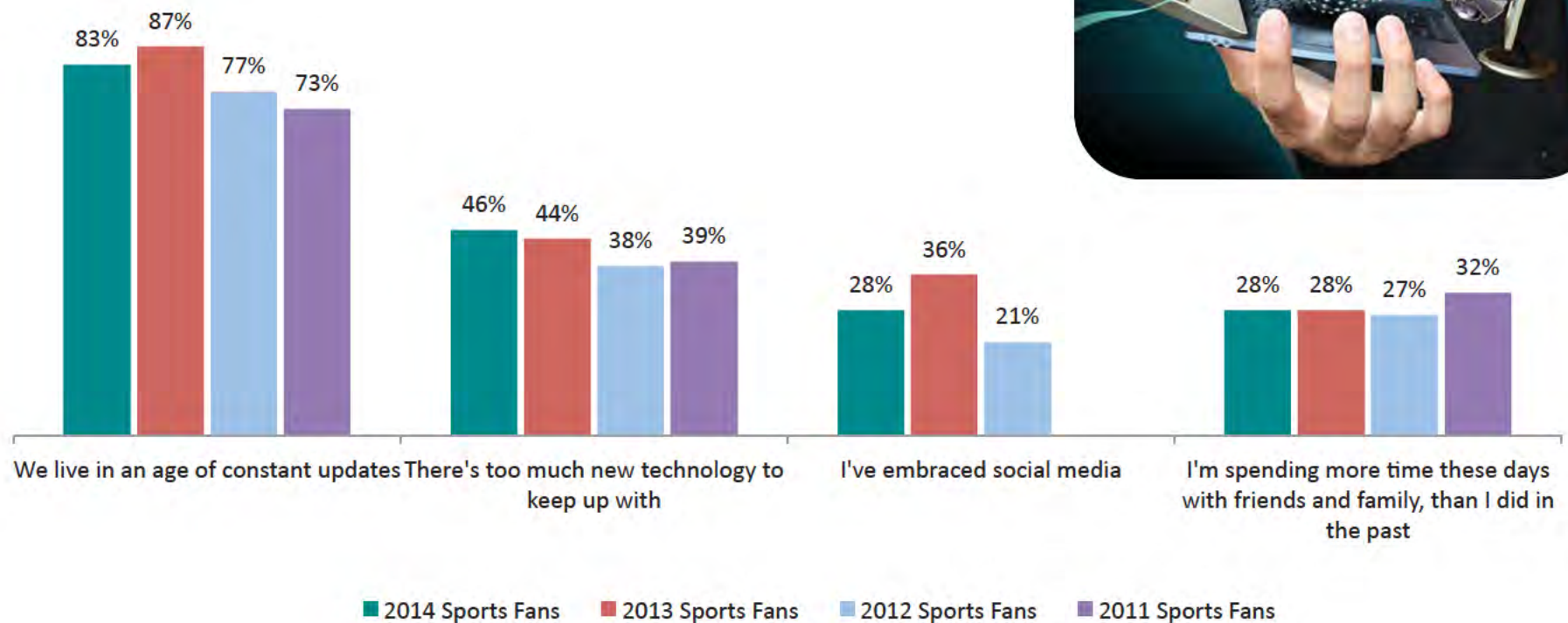
Top 3 Box Summary

Sports Fan Attitudes: Belief in the future



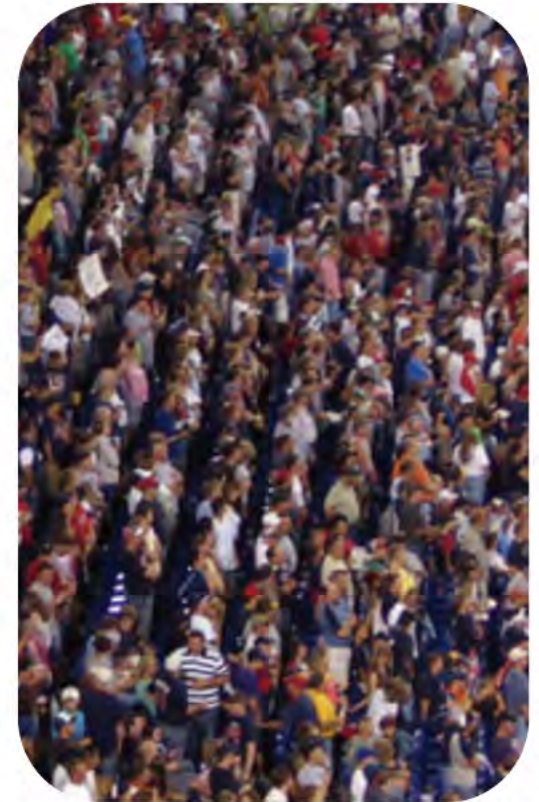
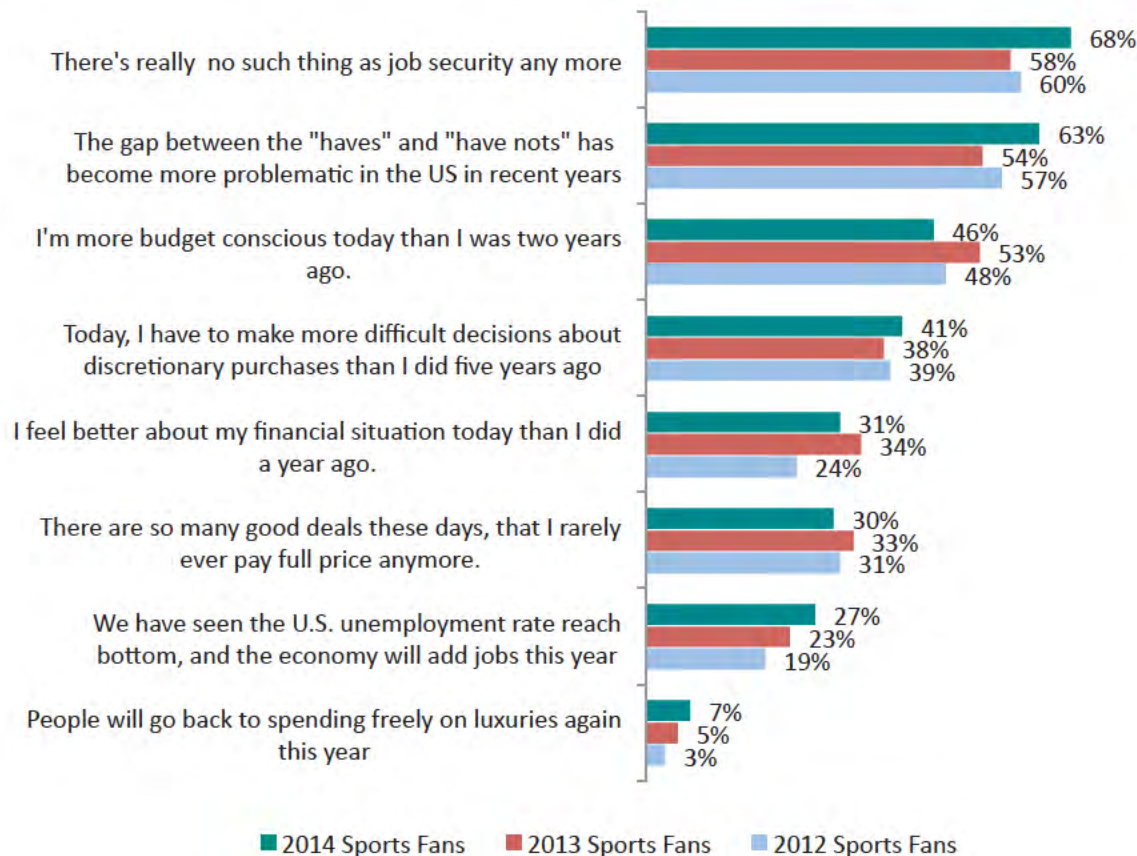
Top 3 Box Summary

Sports Fan Attitudes: Dealing with Info overload



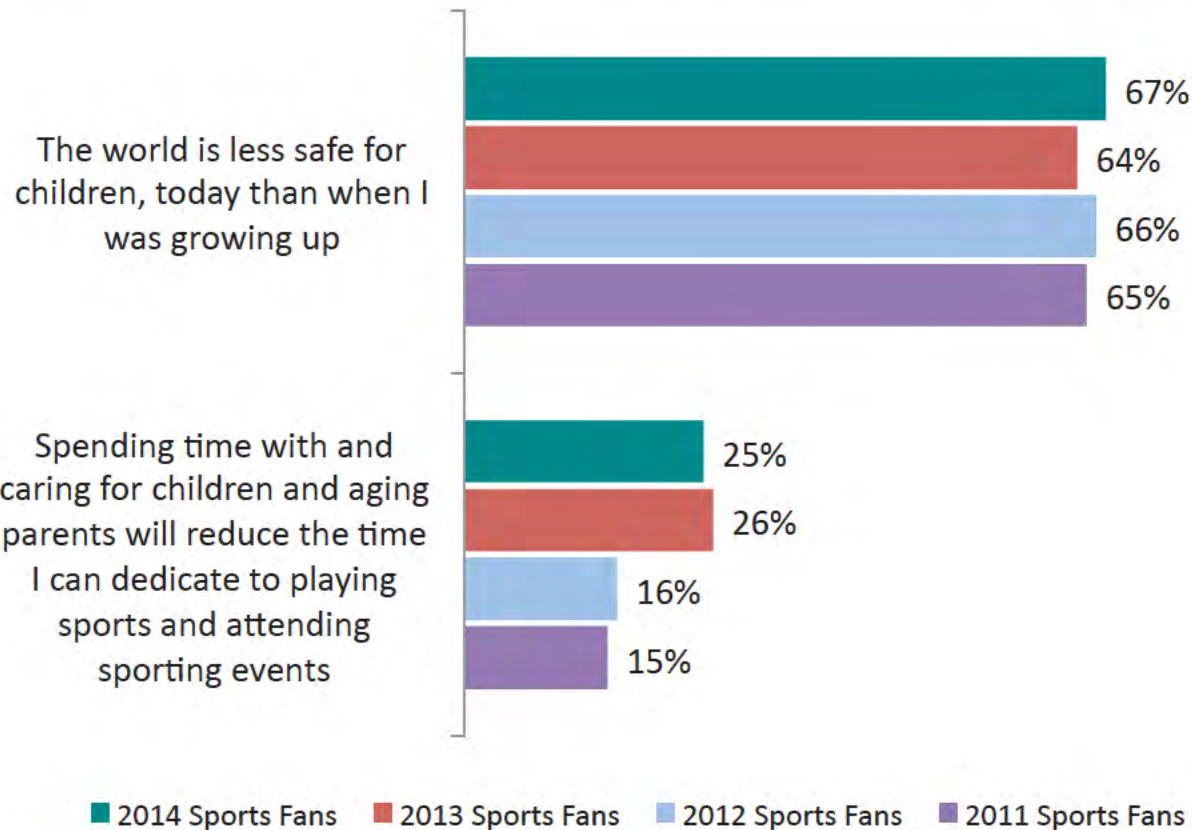
Top 3 Box Summary

Sports Fan Attitudes: Job Security Concerns Linger Amidst Optimism



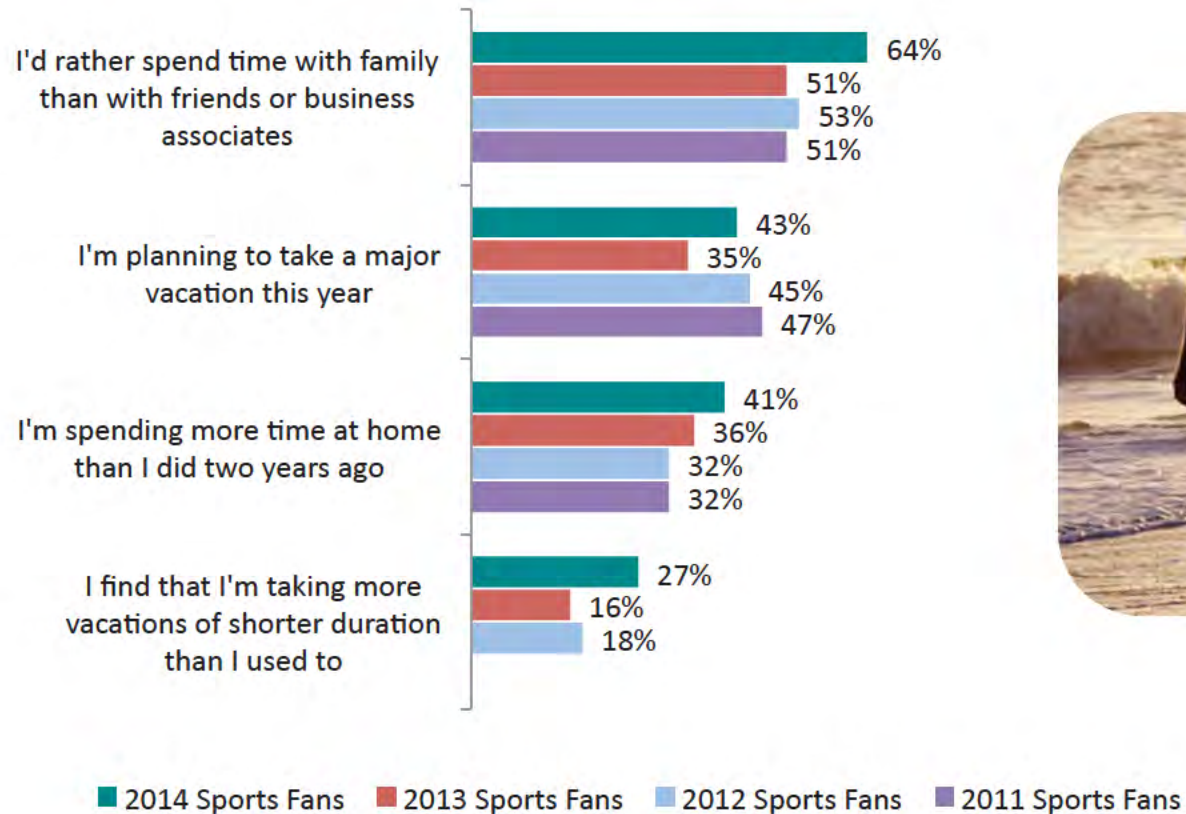
Top 3 Box Summary

Sports Fan Attitudes: Child Centricity Remains



Top 3 Box Summary

Sports Fan Attitudes: Valued Family Time Fuels Appetites for Vacations



Top 3 Box Summary